

# Managing Applications in Utah Clicks

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## Introduction

Recent input into business practices at the Utah Department of Health has required several changes to the Utah Clicks web pages where applications are managed. This document outlines and explains those changes which will come “live” at 12:00 noon on November 29, 2005.

## Managing Applications

Previously, when managing unassigned or assigned applications, the web page provided a list of applications to manage. To the right of each application was a series of links that allowed you to perform various tasks on the application. For example, to add a note, you would click the “Add Notes” link, etc.

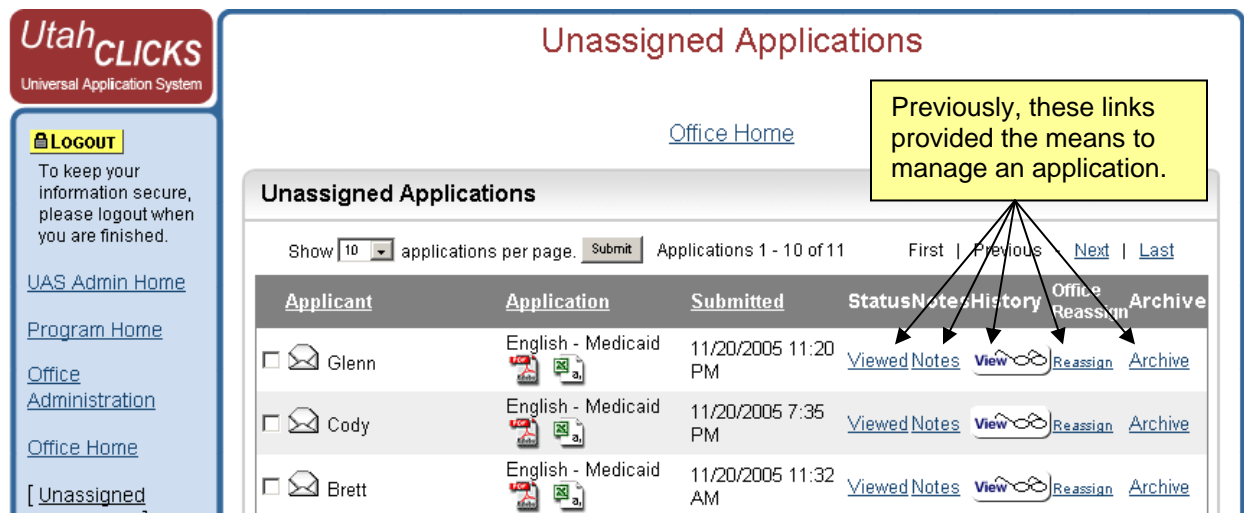


FIG. 1

This page was getting too crowded and too difficult to use.

We discovered that the links on the right of the application did not provide the best functionality and did not show the “whole picture” of the application.

Other problems could also occur if the application was to be managed by two different employees at the same time. If one employee began changing the status of an application at the same time another employee was changing the status, there could be confusion as to what the status is actually supposed to be. Utah Clicks didn’t have a way to determine who was managing which application and when. While this may happen only rarely, there needed to be some way to prevent this type of problem.

In addition, the hyperlinks used to manage an application were getting crowded. The more functionality that we wanted to add to this page, the more crowded it would become.

Thus, we have changed the way applications will be managed (whether assigned or unassigned.) Here is an example of a list of applications:

**UtahCLICKS**  
Universal Application System

**Logout**  
To keep your information secure,

**Unassigned Applications**

**You will now click the applicant's name to manage their application.**

**General information about the application.**

**Checkmarks indicate a resolved application.**

**Exclamations indicate an application that has been in this status for too long.**

**Intake worker that has previously managed applications from this applicant or other family members.**

**Unassigned Applications**

Click on the applicant's name to manage the application.

Show 10 applications per page. Submit Applications 1 - 6 of 6 First Previous - Next Last

Applicant	Application	View	Submitted	Status
<input checked="" type="checkbox"/> <a href="#">flintstone_wilma</a>	English - Baby Your Baby		08/12/2005 2:57 PM	Denied - Applicant h
<input type="checkbox"/> <a href="#">gray_linda</a>	English - Baby Your Baby		08/10/2005 2:26 PM	Assigned
<input type="checkbox"/> <a href="#">Puff_Aida</a>	English - Baby Your Baby		08/08/2005 10:20 AM	Assigned
<input type="checkbox"/> <a href="#">Schofield_Emi</a>	English - Baby Your Baby		08/04/2005 12:48 PM	Assigned
Previous Intake Worker(s): Lareta Bowden				
<input type="checkbox"/> <a href="#">monroe_marilyn</a>	English - Baby Your Baby		07/29/2005 4:38 PM	Assigned
<input type="checkbox"/> <a href="#">mansfield_jane</a>	English - Baby Your Baby		07/29/2005 10:07 AM	Assigned

Assign selected applications to: -- Select Intake Worker -- Applications 1 - 6 of 6 First Previous

FIG. 2

Clicking on the applicant's name will now take you to a web page that displays all of the information about that application. The applicant's name, address, phone number, and email will be displayed. You can view the current status of the application, add notes, archive the application, view the history, and the office manager's account will be able to reassign an application to another office. All of this will be on one page instead of being directed to separate pages to perform the separate functions. Here is a preview of what it will look like:

**UtahCLICKS**  
Universal Application System

**Manage Application**

**Language the client used to fill out the application.**

**Links to view the PDF or Excel version of the application.**

**Links provided to separate areas of the page for different functions.**

**All of the applicant's information is also on this page.**

[Return to Unassigned Applications](#)

**Before managing this application, please view the PDF.**

[Change Status](#) | [Add Notes](#) | [Archive](#) | [History](#) | [Reassign](#)

**Applicant Information**

**Applicant:** Emi Schofield **Address:** 2465 N 1060 E  
BSMT  
North Logan, UT 84341

**Application:** Baby Your Baby

**Language:** English

**View:**

**Email:** [cmschofield@comcast.net](mailto:cmschofield@comcast.net)

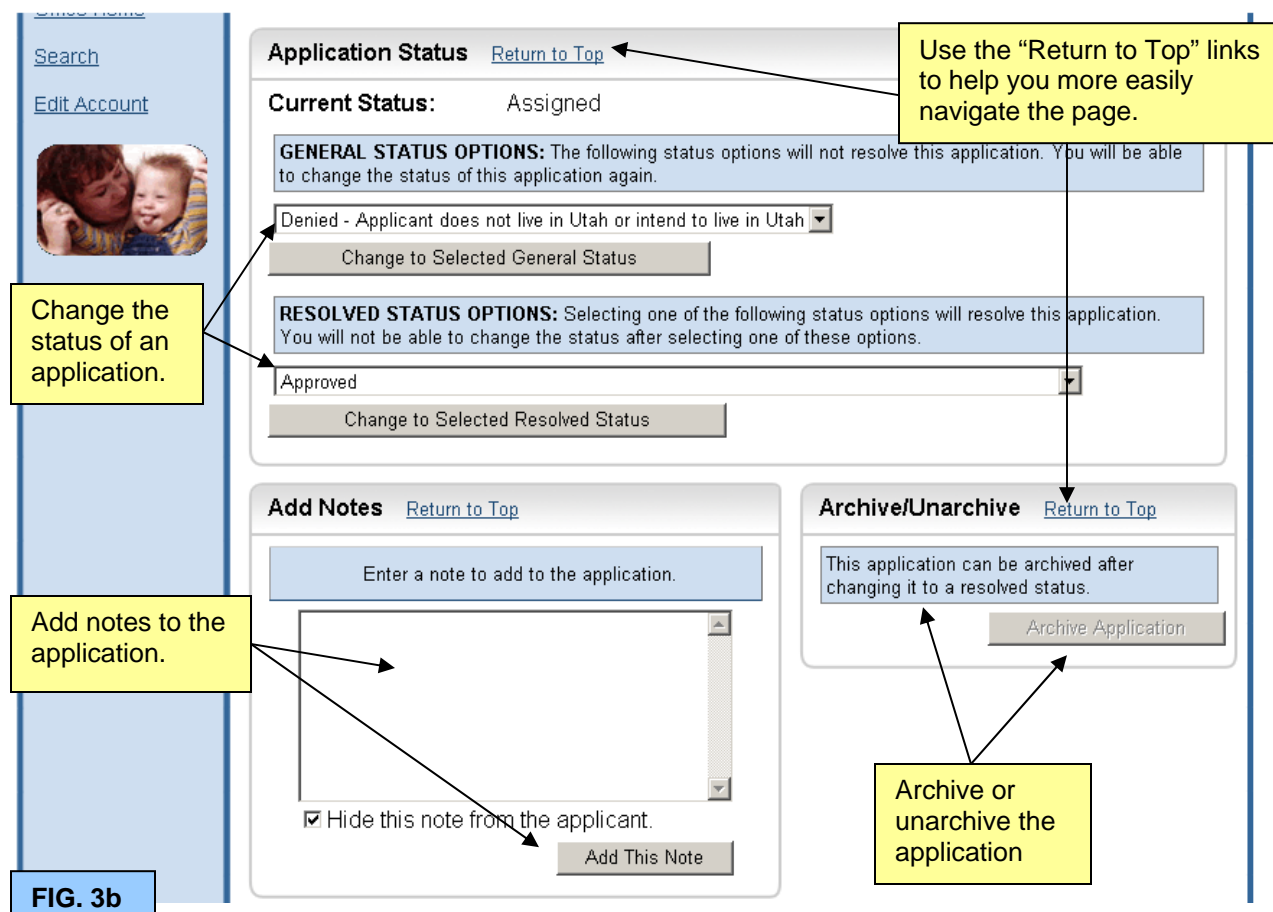
**Application Status** [Return to Top](#)

**Current Status:** Received

FIG. 3a

When you are at this point, the application will be “locked” and no other employee will be able to manage the application until you leave this page or log out of Utah Clicks.

As you scroll down you will be able to see the options for managing the application:



**Changing Application Status** – Changing the status of an application has also changed significantly for those programs that are using this feature. You will need to know that changing the *status* of an application may or may not change the *resolution* of an application. The resolution of an application is simply the type of outcome for the application as determined by the eligibility worker. For example, in Utah Clicks, the “Approved” or “Denied” status options will *resolve* the application after which the application’s status *cannot be changed again*. However, a “Pending”, “Viewed”, or “Assigned” application will not resolve the application and thus, the status can be changed later. **Also note that status options vary from program to program.**

Fig. 3b displays the current status options for this application. There are now two types of status options for an application.

- **General Status Options** WILL NOT resolve the application. You will be able to change the status again later (as explained above).
- **Resolved Status Options** WILL resolve the application. Only a Program Manager can change the status after the application has been resolved.

**Application History** [Return to Top](#)

[View Simple Notes](#)

Date	User	Note
11/15/2005 2:10:31 PM	Chris Schofield	Application Viewed.
11/15/2005 2:08:54 PM	Chris Schofield	Application assigned to
08/23/2005 10:38:30 AM	Chris Schofield	Assigned to Patty Vaquiz
08/11/2005 5:04:05 PM	Debby Carpeza	Assigned to Tatiana Allen
08/08/2005 2:31:22 PM	Debby Carpeza	Assigned to Carisa Ramos
08/08/2005 2:30:58 PM	Debby Carpeza	Assigned to Marie Nagata
5/2/14:26 PM	Debby Carpeza	Assigned to Carisa Ramos
5/12:48:37 PM	System	Application electronically submitted to The Training Place office

[View Simple Notes](#)

**Reassign Application to Another Office** [Return to Top](#)

Select an office to reassign this application. (Sorted down alphabetically.)

- ☐ Bear River Training Site
- ☐ Central Utah Training Site #1  
UDOH/CFHS/RHP P.O. Box 142001  
Salt Lake City, UT 84114-2001  
801-538-9946
- ☐ Salt Lake Clinic Group  
Only accepting current appointments.  
Utah Dept. of Health/CFHS/RHP  
P.O. Box 142001  
Salt Lake City, UT 84114-2001  
801-538-9946
- ☐ Southeastern Utah Training Site
- ☐ Southwestern Utah Training Site
- ☐ Summit/Wasatch Training Site  
801-555-6666
- ☐ The Ogden Training Site  
801-555-6666
- ☐ Tooele County Health Dept.  
151 N. Main
- ☐ Uintah Area Training Site
- ☐ Utah County Health Dept.  
151 S University Ave  
Suite 2800  
Provo, UT 84601  
801-851-7033

**FIG. 3c**

## Archiving Applications

Archiving and unarchiving applications will not change significantly except where the button is located to perform this function. The Archive/Unarchive button is shown in Fig. 3b. It is important to note that applications will be archived *only if the application has been resolved*. However, note that sometimes a “General Status Option” will allow an application to be archived. These status options actually have a **neutral resolution**. It is not important to know the different resolution types. Just understand that sometimes choosing a “General Status Option” may allow you to archive the application.

Utah Clicks also provides an automatic archive feature. Currently, all programs have specified that resolved applications are automatically archived after 30 days. Thus, manual archiving of applications is not required, but you are welcome to archive manually if you wish. Once again, only resolved applications will be automatically archived.

## Archive/Applicant Search

Utah Clicks search features have also been consolidated to one web page. The link on the left menu now reads “Search”. The new search page allows you to search for

applicants OR archived applications. The page will also allow you to search by social security number and ranges for the submission dates of applications.

The screenshot shows the 'System Search' interface of the Utah CLICKS Universal Application System. On the left is a sidebar with a 'Logout' button and links to 'UAS Admin Home', 'Program Home', 'Manage Offices', 'Office Home', '[ Search ]', and 'Edit Account'. Below these links is a small photo of a family. The main content area is titled 'System Search' and 'Search for Applicants/Archived Applications'. It includes a text box explaining that partial data is accepted for searches. Below this are two radio buttons for 'Search Type': 'Applicant Search' (selected) and 'Archive Search'. There are input fields for 'First Name', 'Last Name', 'SSN' (with a format example '123456789'), 'Email', 'Zip Code', 'Street', 'City', 'State', 'Phone' (with a format example '123-456-7890'), and a 'Date Range for Search' section with two date pickers and a format example 'mm/dd/yyyy'. At the bottom are 'Perform Search' and 'Clear Search results' buttons. Four yellow callout boxes with arrows point to specific elements: 'Select the type of search to be performed.' points to the 'Search Type' radio buttons; 'Enter the search criteria in the fields provided. Partial data is accepted.' points to the search input fields; 'You can specify a date range for the dates that applications were submitted.' points to the date range pickers; and another box points to the 'Street' field.

**Utah CLICKS**  
Universal Application System

**Logout**  
To keep your information secure, please logout when you are finished.

[UAS Admin Home](#)  
[Program Home](#)  
[Manage Offices](#)  
[Office Home](#)  
[\[ Search \]](#)  
[Edit Account](#)

**System Search**

**Search for Applicants/Archived Applications**

Search for an archived applications by entering information in the fields below information (except for social security numbers). For example, you can search name of "Johnson" by entering only "John" in the last name field. This will search containing "john".

**Search Type:** ☒ Applicant Search ☐ Archive Search

First Name:   
Last Name:   
SSN:   
Format: 123456789  
Email:   
Zip Code:   
Street:   
City:   
State:   
Phone:   
Format: 123-456-7890

**Date Range for Search**  
Search for applications submitted between:  and   
Format: mm/dd/yyyy

[Clear Search results](#)

**FIG. 4**

As always, you can search with partial data. For example, if you are searching for an applicant's last name of "Johnson", you can enter "John" and Utah Clicks will search for all last names containing the word "john". Because data encryption is applied to sensitive data, searching by partial social security numbers is currently not available.

If you are performing an "Archive Search", the applications will be displayed using the new list shown in Fig. 2. You will be able to manage the applications by clicking the applicant name.

Also, the new search functionality will now return all applicants or archived applications within your program. It will not limit the search to just your office or applications assigned to you. However, intake workers will only be able to manage applications (change status, add notes, etc.) that are assigned to them, and office managers will only be able to manage applications assigned to their office.

In Fig. 5 below you can see that, when searching for applicants, the search results display has not changed. However, clicking on the “View Applications” link will now take you to a page that looks similar to the Unassigned Applications page shown in Fig. 2 and you can manage those applications in the same manner as described above.

**Applicant Search Results** [Return to Top](#)

Show  addresses per page.  Addresses 1 - 10 of 15

**Your search found 15 records.**

**wilma flintstone**

**Contact Information History:**  
History of all changes made to contact information:  
2525 bedrock place  
bedrock, UT 84047  
Home: 801-232-9874

**Submitted Applications:** [View Applications](#)

Application	Date	Office
Baby Your Baby	08/12/2005	The Training Place

**sandra flores**

**Contact Information History:**  
History of all changes made to contact information:  
1356 southbourne cir  
2105  
west valley city, UT 84104  
Home: 801-556-5656

**Submitted Applications:** [View Applications](#)

Application	Date	Office
Baby Your Baby	08/12/2005	Sc

**Maria Florez**

**Contact Information History:**  
History of all changes made to contact information:  
123 So 330 W  
Kings  
123 So 330 W  
Kings  
Home: 435 999-8888  
123 So 330 W  
Kings, UT 84743  
123 So 330 W  
Kings, UT 84743  
Home: 435 999-8888

**Submitted Applications:** [View Applications](#)

Application	Date	Office
Baby Your Baby	10/11/2005	Central Utah Training Site #1

**jane mansfield**

**Contact Information History:**  
History of all changes made to contact information:  
1234 S 678 W

**Submitted Applications:** [View Applications](#)

Application	Date	Office
Baby Your Baby	07/29/2005	The Training Place

**FIG. 5**

You can also see in Fig. 6 that the results from an archive search look similar to the Unassigned Applications page. Once again, to manage an application, simply click the name of the applicant:

**Archive Search Results**
[Return to Top](#)

Click on the applicant's name to manage the application.

Show  applications per page.
Applications 1 - 4 of 4
First | Previous - Next | Last

	Applicant	Application	View	Submitted	Status
✓	✉ <a href="#">Schofield, Emi</a>	English - Baby Your Baby <i>Previous Intake Worker(s): Jackie Black, Chris Schofield</i>		07/06/2005 12:25 PM	Denied - Applicant i
✓	✉ <a href="#">Schofield, Emi</a>	English - Baby Your Baby <i>Previous Intake Worker(s): Debbie Turner</i>		07/06/2005 12:26 PM	Approved
✓	✉ <a href="#">Schofield, Emi</a>	English - Baby Your Baby <i>Previous Intake Worker(s): Jackie Black, Chris Schofield</i>		07/06/2005 12:45 PM	Approved
✓	✉ <a href="#">flintstone, wilma</a>	English - Baby Your Baby		08/12/2005 2:57 PM	Denied - Applicant h

Applications 1 - 4 of 4
First | Previous - Next | Last

**FIG. 6**

## Conclusion

We hope that these changes will allow you to more easily manage and search for applications. You are welcome to email suggestions for future enhancements or comments on the current system to [Chris.Schofield@usu.edu](mailto:Chris.Schofield@usu.edu).